

MAKE IDEAS HAPPEN



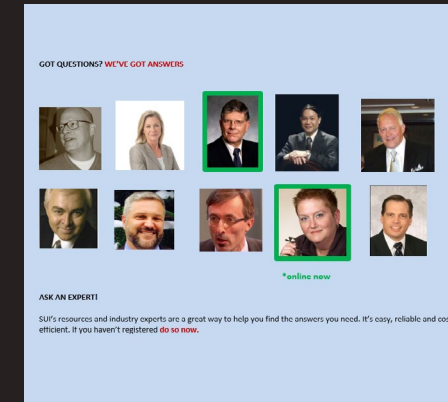
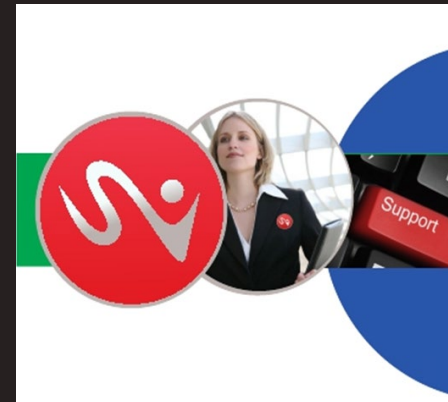
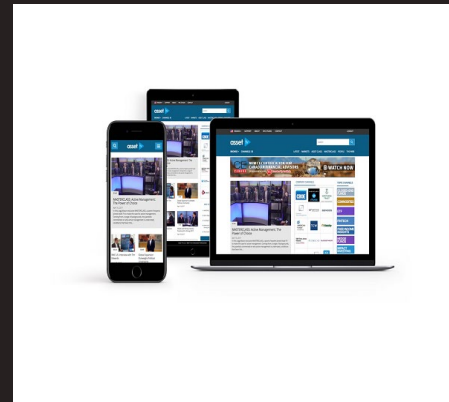
IIAC members receive 15 months for the price of 12 in the first year of the SmartDirect™ system service. New customers only.

IIAC members receive 20% off ANY video or digital course!

Smarten Up Institute Inc.

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smartenupinstitute.com

Providing QUALITY technology & education to the Canadian Advisor to BEST serve the investing public.



ABOUT US

As the independent leader in Canadian education technology (eduTECH) and financial courses, and now formally partnered with global media company ASSET TV, SUI has added 3 new products on its proprietary SmartDirect® system to become the leading eduTECH (information delivery and credential management) platform specifically designed for Advisors — therefore making higher education pay for itself while meeting Advisor CE needs.

Over 150 online courses — updated in real-time, 8 designations listed with IIROC, the MFDA Policy 8 ETF Licensing course, and 12,000 graduates.

Proud to be a Canadian, employee owned, education technology (eduTECH) company.

WHY CHOOSE SUI & ASSET TV?

The partnership with AssetTV, and the launch of the 'CE Canada' certification on the AssetTV media platform, merges SUI's exceptional online and customized educational programs with AssetTV's powerful validation, research and learning online video platform.

The ALL-IN-ONE solution

VIDEO, RESEARCH, and LEARNING. The platform allows you to create your own TV channel for marketing and education with a reach to over 400,000 Advisors worldwide, and with the SmartDirect™ system, making education pay for itself while your Advisor focuses on their CE and License needs.

Contact us today for a demo of the platform and how you can directly reach Advisors all around the world.

OUR PRODUCTS

ADVISOR SMARTCASE®: a secure and private online storage system for advisor's compliance related documents. No more having to search, print, find the backup or recreate.

ASK AN EXPERT: to accommodate an international audience, we bring product, compliance, regulatory and business experts that are capable of answering all your questions in English and French.

TARGET ADVERTISING AND MARKETING: via the SmartDirect® system's advertising panels provide you the opportunity to market directly to professionals.

CONFERENCE MANAGEMENT and VIRTUAL CONFERENCE BOOTHS: sign on to ALL products with a single registration to provide specific reporting to our customers. No more having to register for multiple events, seminars, conferences, courses and more.

OUR PRODUCTS

COURSES THAT ARE UPDATED IN REAL-TIME: a powerful technology platform that is both flexible and scalable; making education pay for itself while your Advisor takes care of their CE and licensing needs.

FASTTRACK to CCO/CFD/PDD/NEC/EMP: our global customers need to have immediate registration and licensing so they can conduct business in Canada. We commit you'll pass the licensing exams so you can take care of what matters: your business.

ADDITIONAL RESOURCES FOR CLIENT SUPPORT: providing professional services to many industry companies, filling a variety of roles and accomplishing many tasks, for example: research and white papers; audit support; part time CEO and CFD; IIROC/MFDA registration; AML audit support; expert witness; and custom leadership and executive training programs.

IT'S ABOUT MAKING IDEAS HAPPEN

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TESTIMONIAL

Neal Weston, Director of Global Compliance and Trade Surveillance at Scotiabank says, "With SmartDirect®, SUI took the time, effort and investment dollars to bring this powerful #educationtechnology <#eduTECH> with real-time updates, that is both flexible and scalable, to meet the needs of today's sophisticated advisor." He adds, "The system adds revenue channels so firms can enthusiastically support continuing education needs, and SUI continues to invest in new programs like the FastTrack® to Licensing program. We at Scotia will continue to use this excellent program to assist our Advisors in their immediate registration and licensing needs."

PRODUCTS

ADVISOR SMARTCASE™, the all-in-one compliance briefcase.

ASK AN EXPERT where Advisors get answers relevant to their business.

ADVERTISING AND TARGET MARKETING with SUI's ADpanels® where manufacturers and vendors alike advertise their products.

150+ COURSES; 8 DESIGNATIONS; MFDA's ETF LICENSING COURSE.

FASTTRACK to REGISTRATION for the PDD, CCO, NEC, EMP and ETHICS.

CREDENTIAL MANAGEMENT with progress control and email alerts.

CERTIFICATE MANAGEMENT for ALL licenses.

APPLICATION PROGRAM INTERFACE (API) integration to Regulators and CRM systems, e.g. Salesforce.

VIRTUAL CONFERENCE BOOTHS

SINGLE SIGN-ON for all system products enables robust analytics and reporting.



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Email us for:

- a SmartDirect™ demo on making education pay for itself while meeting Advisors' CE and Licensing needs; or
- for more information on our over 150 Courses and Designations.

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